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The Canadian Occupational Projection System

INDUSTRIAL AND OCCUPATIONAL PROFILE OF THE QUEBEC FURNITURE AND FIXTURE SECTOR

Prepared as part of the

CANADIAN OCCUPATIONAL PROJECTION SYSTEM (COPS)

Quebec Region

Canada

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(AUSSI DISPONIBLE EN FRANÇAIS SUR DEMANDE)

PROFILE NO 9

INDUSTRIAL AND OCCUPATIONAL PROFILE
OF THE QUEBEC FURNITURE AND FIXTURE SECTOR

Prepared as part of the

CANADIAN OCCUPATIONAL PROJECTION SYSTEM
(COPS)

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ECONOMIC SERVICES BRANCH
CANADA EMPLOYMENT AND IMMIGRATION COMMISSION
QUEBEC REGION
DECEMBER 1986

In this document, the masculine generally refers to persons of both sexes. In certain cases, however, reference is specifically made to one sex.

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CHAPTER I

CHARACTERISTICS OF THE FURNITURE AND FIXTURE SECTOR

A) DEFINITION OF THE INDUSTRY

The definition of the furniture industry given in the 1970 edition of Statistics Canada's Standard Industrial Classification has been used for this profile mainly because of the difficulty of obtaining series of historical data corresponding to the new Standard Industrial Classification of 1980. The industry definition is therefore as follows:

<u>261 - Household Furniture Manufacturers</u>: Establishments primarily engaged in manufacturing household furniture of all kinds and of all materials. This industry also includes upholstery, cabinet making and furniture repairing shops.

<u>264 - Office Furniture Manufacturers</u>: Establishments primarily engaged in manufacturing office furniture such as desks, chairs, tables, filing cabinets of all kinds and of all materials.

<u>266 - Miscellaneous Furniture and Fixtures Manufacturers</u>: Establishments primarily engaged in manufacturing store furniture and fixtures, public building and professional furniture and fixtures of all kinds and of all materials. This industry also includes establishments primarily engaged in manufacturing mattresses and box springs.

<u>268 - Electric Lamp and Shade Manufacturers</u>: Establishments primarily engaged in manufacturing electric table and floor lamps and shades of all types and of all materials.

B) SIZE OF THE QUEBEC INDUSTRY

1) IN RELATION TO THE CANADIAN FURNITURE INDUSTRY

The Canadian furniture industry is chiefly based in Ontario and Quebec; in recent years, Ontario's share of total Canadian output has been increasing

while Quebec's has been falling. Table 1 shows that Ontario's share of the industry's manufacturing shipments rose from 49.4% in 1970 to 58.0% in 1984, while Quebec's share dropped from 37.5% to 28.3% over the same period.

TABLE 1
MAIN INDICATORS OF TRENDS IN THE QUEBEC FURNITURE INDUSTRY,
AS PART OF THE OVERALL CANADIAN FURNITURE SECTOR,
AND COMPARISON WITH THE ONTARIO FURNITURE INDUSTRY
(relative share in %)

INDICATOR	YEAR	QUEBEC/CANADA	ONTARIO/CANADA
NUMBER OF FIRMS	1970	34.7	40.7
	1976	35.6	40.6
	1982	36.8	39.5
	1984*	35.6	40.5
NUMBER OF EMPLOYEES	1970	39.7	47.2
	1976	38.2	48.4
	1982	32.3	53.3
	1984*	32.5	54.1
VALUE OF MANUFACTURING SHIPMENTS	1970	37.5	49.4
	1976	36.3	50.6
	1982	29.4	56.3
	1984*	28.3	58.0
MANUFACTURING VALUE ADDED	1970	37.6	49.9
	1976	36.7	50.1
	1982	29.6	56.2
	1984*	30.9	58.2
CAPITAL EXPENDITURES (plant and equipment)	1970	28.7	56.7
	1976	50.5	31.6
	1982	12.2	83.0
	1984	28.1	58.0
EXPORTS BY PROVINCE OF SHIPMENT	1970	n.a.	n.a.
	1976	30.8	64.1
	1982	22.2	70.1
	1984	20.8	72.1

* Estimate

SOURCE: Statistics Canada, Cat No 31-203, 61-206, 65-202

While the relative share of Canadian furniture manufacturing firms remained fairly constant in the two provinces, hovering around 40% for Ontario and 35% for Quebec, the relative share of employment did not. Between 1970 and 1984, Ontario increased its share of total industry employment by 6.9 percentage points, whereas Quebec's share decreased by 7.2 percentage points.

Ontario also ranks first in both capital expenditures and exports by province of shipment. Quebec, while still the second largest furniture producing province in Canada, lost ground steadily between 1970 and 1984.

2) IN RELATION TO THE QUEBEC MANUFACTURING SECTOR

Table 2 presents the main indicators of the relative importance of the furniture industry in the overall manufacturing sector in Quebec in 1982, the last year for which statistics corresponding to the 1970 edition of the Standard Industrial Classification are available.

Of the 20 industries that make up the manufacturing sector, the furniture industry ranks in the last quarter for all the main statistical indicators save employment, where it ranks thirteenth. Productivity in the industry is only half the average level in the manufacturing sector. This poor performance is chiefly due to the small size of Quebec firms, which precludes the potential benefits of economies of scale, and the miniscule amounts these firms allocate to capital expenditures.

C) STRUCTURE OF THE QUEBEC INDUSTRY

1) SIZE OF FIRMS

The CEIC employer files updated as of 1986 (see Table 3) shows that 86% of Quebec furniture manufacturing firms employ fewer than 20 people. If firms employing from 20 to 100 people are included, this percentage rises to nearly 98%. These two categories of firm provide some 12,200 jobs, which

corresponds to 69% of the work force in the furniture industry. Medium-sized firms, of which there are 35, account for the rest of the jobs in the sector, some 5,510, since there are no companies with 500 or more employees.

TABLE 2
QUEBEC FURNITURE INDUSTRY IN RELATION TO
OVERALL QUEBEC MANUFACTURING
1982

INDICATOR	FURNITURE INDUSTRY	MANUFACTURING SECTOR	RELATIVE SHARE (%)	RANK (out of 20)
Value of manufacturing shipments([1]) (millions of $)	732,314	49,179,416	1.5	17
Manufacturing value added([1]) (millions of $)	370,301	18,833,365	2.0	18
Fixed capital stock - June([1]) (millions of 1971 $)	96	9,512	1.0	15
Utilization rate of production capacity([2]) (%)	65.9	68.7	-	-
Employment([3]) (thousands)	21	542	3.9	13
Productivity (thousands of $) (m.v.a./hours paid to production workers)	5.0	9.2	-	-
Average size of firms([1]) (employees/number of firms)	17	45	-	-
Capital expenditures([4]) (plant and equipment) (millions of $)	4.3	2,159.8	0.2	19

SOURCES: ([1]) Statistics Canada, Cat No 31-203.
([2]) Department of Regional Industrial Expansion, Economic Indicators, June 1986.
([3]) Statistics Canada, Cat No 71-001
([4]) Statistics Canada, Cat No 61-206

TABLE 3
SIZE OF FIRMS
QUEBEC FURNITURE AND FIXTURE INDUSTRY
QUEBEC REGION
1986

SIZE		EMPLOYERS			EMPLOYEES		
			RELATIVE SHARE (%)			RELATIVE SHARE (%)	
CATEGORY	NUMBER OF EMPLOYEES	NUMBER	FURNITURE INDUSTRY	MANUFACTURING SECTOR	NUMBER	FURNITURE INDUSTRY	MANUFACTURING SECTOR
I	1 to 4	941	64.7	11.9	1,869	10.5	10.8
II	5 to 19	311	21.4	5.4	2,900	16.3	5.1
III	20 to 49	115	7.9	4.9	3,534	19.9	5.0
IV	50 to 99	54	3.7	5.0	3,960	22.3	5.4
V	100 to 199	25	1.7	4.4	3,359	18.9	4.4
VI	200 to 499	9	0.6	2.7	2,152	12.1	2.2
VII	500 to 999	-			-		
VIII	1,000 +	-			-		
TOTAL		1,455	100.0	8.1	17,774	100.0	3.4

SOURCE: CEIC, Employer files, Quebec region, 1986-1987.

2) GEOGRAPHIC DISTRIBUTION

Table 4 shows the geographic distribution in Quebec of furniture industry firms in 1986 according to the district breakdown used by the CEIC (see Appendix A). The Metropolitan Montreal district has the highest concentration of furniture industry employers and employees, with 37% and 46% respectively. Montreal also has the greatest number of medium-sized firms. The district with the second-highest concentration of firms and jobs is Southern and Central Quebec, which takes in the St Maurice Valley and Bois Francs regions. This district accounts for close to 26% of furniture industry

employers and employment. The Quebec City/Saguenay-Lake St John district ranks third, with 18% of total firms and 19% of total jobs; most of its business comes from the Quebec City and Beauce regions. Lastly we should not forget to mention Northwestern Quebec, where 16% of the industry's firms but just 8% of its jobs are located.

TABLE 4
GEOGRAPHIC DISTRIBUTION OF FIRMS
QUEBEC FURNITURE AND FIXTURE INDUSTRY
1986

DISTRICT	SIZE OF FIRMS						TOTAL			
	I & II		III & IV		V & VI		NUMBER		REL.SHARE(%)	
	YERS	YEES	YERS	YEES	YERS	YEES	YERS	YEES	YERS	YEES
SOUTH AND CENTRAL QUEBEC	319	1,042	49	2,407	7	1,115	375	4,564	25.8	25.7
QUEBEC CITY/SAG. LAKE ST JOHN	226	864	26	1,465	6	978	258	3,307	17.7	18.6
NORTHWESTERN QUEBEC	210	653	15	541	2	271	227	1,465	15.6	8.2
LOWER ST LAWRENCE/ GASPE/NORTH SHORE	58	218	3	94	-	-	61	312	4.2	1.8
METROPOLITAN MONTREAL	439	1,992	76	2,987	19	3,147	534	8,126	36.7	45.7
TOTAL QUEBEC REGION	1,252	4,769	169	7,494	34	5,511	1,455	17774	100%	100%

Note: yers = employers; yees = employees.

SOURCE: CEIC, Employer files, Quebec Region, 1986-1987

3) INDUSTRIAL STRUCTURE BY SUBSECTOR

The predominance of household furniture manufacturing in the Quebec furniture and fixture industry can be seen clearly in Table 5. In 1982, for instance, the last year for which statistics corresponding to our industry definition are available, 74% of industry firms produced household furniture; these firms employed 65% of the work force and accounted for 60% of the manufacturing shipments and value added in the furniture industry. Miscellaneous furniture and fixture manufacturers nevertheless represented a fairly significant part of the total industry, accounting for about 20% of each of the main indicators. Although only a very small number of firms manufacture office furniture, this subsector provides 12% of industry employment and 15% of total production. The average size of office furniture manufacturers is considerably larger than the average size in the industry as a whole, ie 54 compared with 17 employees per firm. The electric lamp and shade manufacturing subsector remains relatively small, accounting for only 4% of each of the main indicators.

TABLE 5
PERCENTAGE BREAKDOWN OF MAIN INDICATORS BY INDUSTRY SUBSECTOR
QUEBEC FURNITURE AND FIXTURE INDUSTRY
1982

INDICATOR	SUBSECTOR			
	HOUSEHOLD FURNITURE	OFFICE FURNITURE	MISCELLANEOUS FURNITURE	LAMPS AND SHADES
Number of firms	74%	4%	18%	4%
Number of employees	65%	12%	19%	4%
Value of manufacturing shipments	60%	15%	21%	4%
Manufacturing value added	60%	16%	20%	4%

SOURCE: Statistics Canada, Manufacturing industries of Canada, Cat No 31-203.

CHAPTER II

MARKET TRENDS

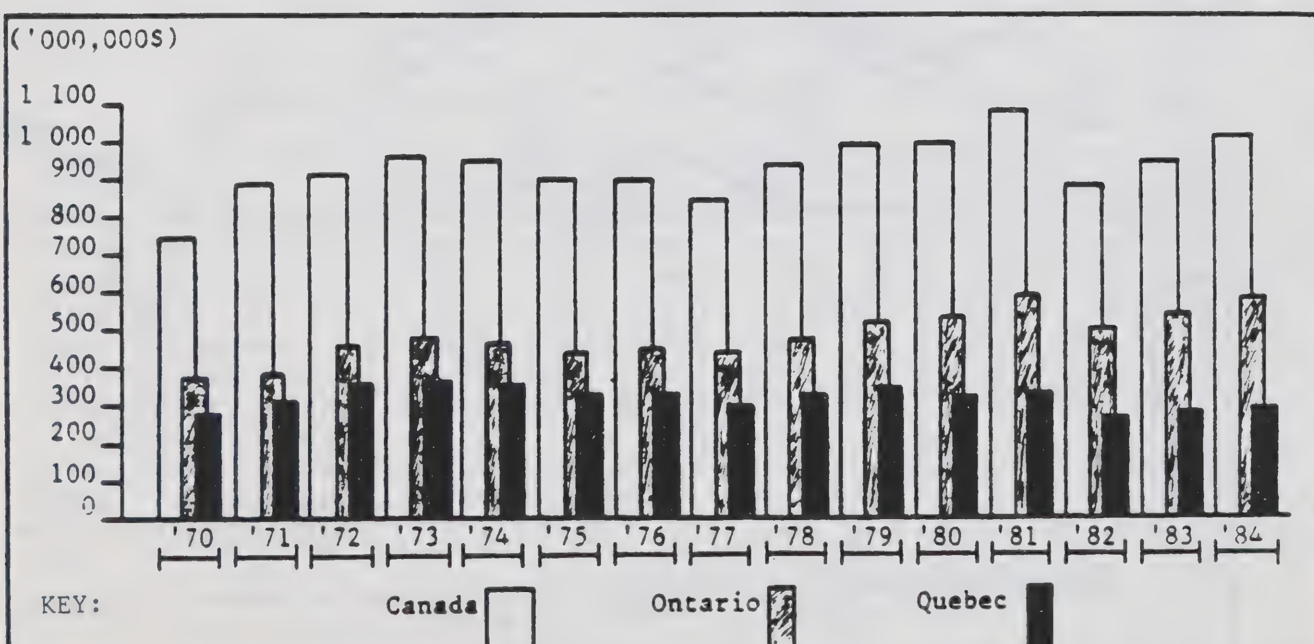
A) GENERAL TRENDS IN THE INDUSTRY

1) MAIN CYCLICAL FACTORS

a) Decline in Quebec's Share of the Canadian Furniture Industry

Quebec's declining share of the Canadian furniture industry is illustrated in Graph 1, which shows changes in the value of manufacturing shipments in 1971 constant dollars. During the first half of the 1970s, no significant changes were recorded in the size of the Quebec industry in relation to the Canadian furniture sector, with its share fluctuating around 37%, as against 50% for Ontario. Since 1977, however, the proportion of Canadian shipments originating in Quebec has declined steadily in favour of Ontario. From 35% in 1977, Quebec shipments of the Canadian total had sunk to 28% in 1984; over the same period, Ontario's share rose from 51% to 58%.

GRAPH 1
TRENDS IN MANUFACTURING SHIPMENTS
FURNITURE AND FIXTURE INDUSTRY
CANADA, ONTARIO, QUEBEC
(1971 $)

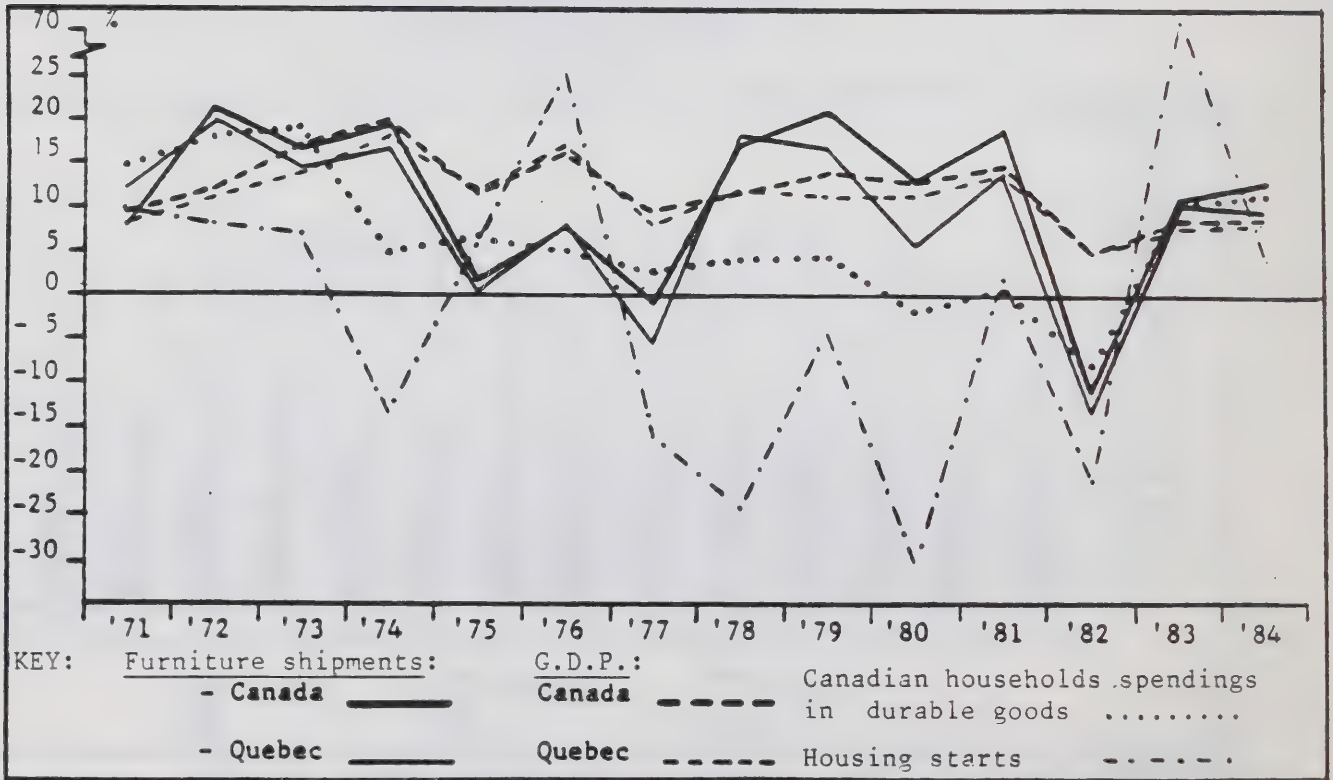


SOURCES: Statistics Canada, Cat No 31-203; CEIC Estimate 1983-1984.

b) Health of Industry Dependent on Economic Situation

Because of the durability and relatively high inherent costs of furniture and fixtures - whether household, office, industrial, institutional or government - these goods are not top-priority items for consumers. In fact, demand for furniture closely follows swings in the economy. Graph 2 shows that annual rates of change in Canadian and Quebec manufacturing shipments of furniture fluctuate with rates of change in Canadian and Quebec GDP. A clear link between housing starts and furniture sales can be discerned. Thus, during periods of economic slowdown or recession, as in 1977 and 1982, for instance, consumer spending on durable goods, such as furniture, drops and then picks up again during periods of prosperity, as between 1972 and 1974 and between 1978 and 1980.

GRAPH 2
PERFORMANCE OF FURNITURE AND FIXTURE INDUSTRY
COMPARED WITH MAIN ECONOMIC INDICATORS
CANADA, QUEBEC
ANNUAL RATE OF CHANGE



SOURCE: Statistics Canada, CANSIM computerized data bank.

c) High Level of Self-sufficiency in Canada

Using statistics on manufacturing production and international trade, we can estimate the degree of self-sufficiency of Canadian industry with regard to domestic demand. The estimate can be obtained by calculating the ratio of imports to the apparent market; the apparent market can be worked out by subtracting exports from manufacturing shipments and adding imports. The smaller the ratio, the greater the degree of self-sufficiency. Table 6 gives the trend since 1970 in constant dollars of apparent Canadian consumption of furniture and fixtures, with the exception of lamps and shades which are included in international trade statistics on lighting equipment.

While imports grew considerably over the period in question, they held only a small share (always less than 15%) of the apparent Canadian market. To a very large extent, then, domestic demand is met by domestic supply. As far as the various subsectors are concerned, the office furniture market has the highest level of self-sufficiency, followed by the miscellaneous furniture and fixture subsector and, in last place, the household furniture market.

TABLE 6
APPARENT CANADIAN CONSUMPTION
FURNITURE AND FIXTURE INDUSTRY
1970 TO 1984
(millions of 1971 $) ([1])

INDICATOR	1970	1972	1974	1976	1978	1980	1982	1984
Shipments	729	877	921	868	901	977	1,056	1033([2])
Exports	33	36	44	41	67	99	113	179
Imports	41	62	112	113	131	117	89	125
Apparent market	736	902	989	940	965	996	847	979
. Imports/a.m. (%)	5.5	6.9	11.3	12.1	13.6	11.8	10.5	12.8
. Degree of domestic self-sufficiency	94.5	93.1	88.7	87.9	86.4	88.2	89.5	87.2

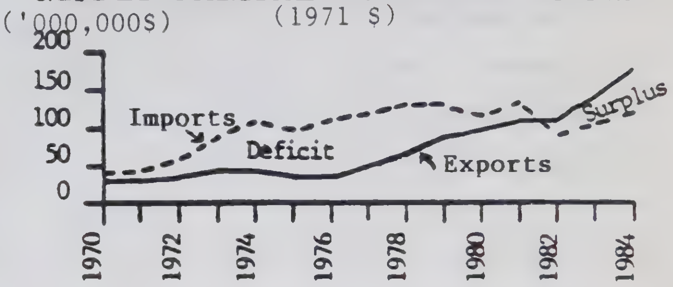
NOTES: ([1]) Data have been rounded off.
([2]) Estimate

<u>SOURCE</u>: Statistics Canada, Cat No 31-203, 65-202, 65-203.

d) Recent Trade Surplus of Furniture Industry in Canada

After reporting a fairly substantial trade deficit in the 1970s (more than 50 million in constant dollars), the Canadian furniture and fixture industry gradually closed the gap and has even posted a surplus since 1982. This is a good sign for the future of the industry in Canada. Here again, the lamp and shade subsector is not included since statistics for this product group are recorded under lighting equipment.

GRAPH 3
EXTERNAL TRADE
CANADIAN FURNITURE AND FIXTURE INDUSTRY
(1971 $)



SOURCE: Statistics Canada, Cat No 65-202, 65-203

i) Export Trends

- By Subsector:

TABLE 7
EXPORT TRENDS BY SUBSECTOR
CANADIAN FURNITURE AND FIXTURE INDUSTRY
1970 TO 1984
(millions of 1971 $)

SUBSECTOR	1970	1972	1974	1976	1978	1980	1982	1984
Household furniture	13	15	15	10	12	20	23	43
Office furniture	11	11	14	14	30	56	64	95
Miscellaneous furniture	9	10	15	17	25	23	26	41

SOURCE: Statistics Canada, Cat No 65-202.

Export growth in the Canadian furniture and fixture industry has occurred chiefly since 1978. Table 7 shows that Canadian office furniture manufacturers are essentially responsible for this increased penetration of foreign markets. Since 1980, this group has accounted for over half of all furniture exports. The export share of manufacturing shipments in 1984 was 36% for office furniture as compared with 16% for the miscellaneous furniture subsector and just 8% for household furniture.

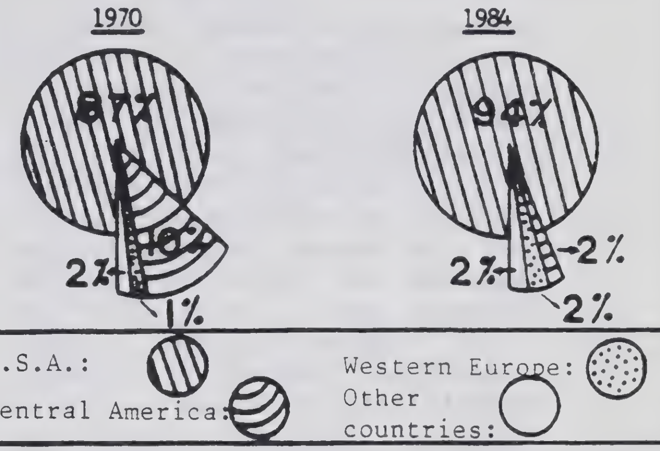
- By Destination:

The vast majority of Canadian exports of furniture and fixtures go to the United States. The US share of total Canadian exports rose from 86.7% in 1970 to 94.2% in 1984. The Central American export market virtually dried up, as its share of exports dropped from 9.9% to 1.6%. Export sales to Western Europe remain very limited.

ii) Import Trends

- By Subsector

GRAPH 4
EXPORTS BY DESTINATION
CANADIAN FURNITURE AND FIXTURE INDUSTRY



SOURCE: Statistics Canada, Cat No 65-003

TABLE 8
IMPORT TRENDS BY SUBSECTOR
CANADIAN FURNITURE AND FIXTURE INDUSTRY
1970 TO 1984
(millions of 1971 $)

SUBSECTOR	1970	1972	1974	1976	1978	1980	1982	1984
Household furniture	25	44	81	82	95	85	60	87
Office furniture	6	6	9	8	11	11	9	12
Miscellaneous furniture	10	13	21	23	25	20	19	26

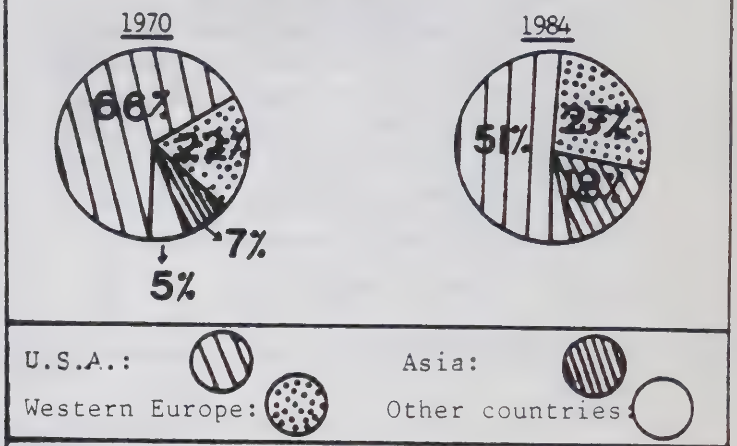
SOURCE: Statistics Canada, Cat No 65-203

After increasing twofold in the early 1970s, Canadian imports of furniture and fixtures remained fairly steady over the ten-year period from 1974 to 1984, with the exception of a sharp dip in 1982 because of the recession. Table 8 shows that household furniture accounted for the majority of imports, generally more than 70% of the total, over the period in question. In 1984, imports represented 15% of domestic purchases of household furniture, 11% of such purchases of miscellaneous furniture, and 7% of the corresponding figure for office furniture.

- By Origin:

Although the United States is still the source of most of Canada's furniture imports, its share of the Canadian import market declined from 66.5% in 1970 to 51.3% in 1984. Western Europe, and Italy in particular, was the second largest foreign supplier of furniture to the Canadian market, with 26.9% of total imports in 1984. Asian countries, headed by Taiwan, supplied 18% of Canada's overall furniture imports; this represents a threefold increase in their share of the import market over 1970.

GRAPH 5
IMPORTS BY ORIGIN
CANADIAN FURNITURE AND FIXTURE INDUSTRY



SOURCE: Statistics Canada, Cat No 65-006

2) MAIN STRUCTURAL FACTORS

a) Small Size of Firms and Low Productivity

The size of Quebec furniture manufacturing firms, with the exception of the office furniture subsector, is significantly smaller than the manufacturing sector average (see Table 9). The small size of these companies prevents them from taking advantage of economies of scale and tends to perpetuate the "Cottage-industry" nature of the Quebec furniture sector. Such small production units preclude the division of labour and offer few possibilities for automation, thus hobbling efforts to raise output and benefit from increasing returns to scale.

TABLE 9
AVERAGE NUMBER OF EMPLOYEES PER FIRM
QUEBEC FURNITURE AND FIXTURE INDUSTRY
1970 TO 1982

INDUSTRY	1970	1972	1974	1976	1978	1980	1982
Furniture industry	22	25	25	29	26	21	17
- Household furniture	17	20	21	26	22	18	15
- Office furniture	83	85	86	76	69	79	54
- Miscellaneous furniture	31	32	30	31	29	25	18
- Lamps and shades	25	31	30	36	32	23	18
All manufacturing	51	52	54	58	54	49	45

SOURCE: Statistics Canada, Manufacturing industries of Canada, Cat No 31-203.

Productivity in the Quebec furniture industry was only half that of the overall manufacturing sector in 1982. This gap has been widening ever since 1970. Moreover, the productivity of the Quebec industry has always lagged behind the performance of the Ontario industry.

TABLE 10
PRODUCTIVITY TRENDS (1)
QUEBEC AND ONTARIO FURNITURE AND FIXTURE INDUSTRIES
1970 TO 1982

INDUSTRY	1970	1972	1974	1976	1978	1980	1982
Quebec furniture	5.0	5.3	5.0	5.1	5.4	5.3	5.0
Ontario furniture	5.8	6.1	5.7	5.7	6.3	6.0	5.8
Quebec manufacturing	7.5	8.0	8.3	8.3	9.1	9.2	9.2

NOTE; (1) Productivity: manufacturing value added in 1971 $/hours paid to production workers.

SOURCE: Statistics Canada, Manufacturing industries of Canada, Cat No 31-203.

b) Insufficient Capital Investment

Capital expenditures on plant and equipment in the Quebec furniture and fixture industry amount to only a minute proportion of the total capital outlays made in the overall manufacturing sector, as can be seen in Table 11.

TABLE 11
CAPITAL EXPENDITURES
QUEBEC FURNITURE AND FIXTURE INDUSTRY
1970 TO 1984

INDICATOR	1970	1972	1974	1976	1978	1980	1982	1984
Capital expenditures in the Quebec furniture industry (millions of $)	4.5	9.4	16.2	10.7	7.5	10.5	4.3	8.9
Quebec furniture / Canada furniture (%)	28.7	49.5	38.0	50.5	39.1	33.3	12.2	28.1
Quebec furniture / Quebec manufacture (%)	0.7	1.4	1.2	0.9	0.6	0.5	0.2	0.3

SOURCE: Statistics Canada, Cat No 61-206.

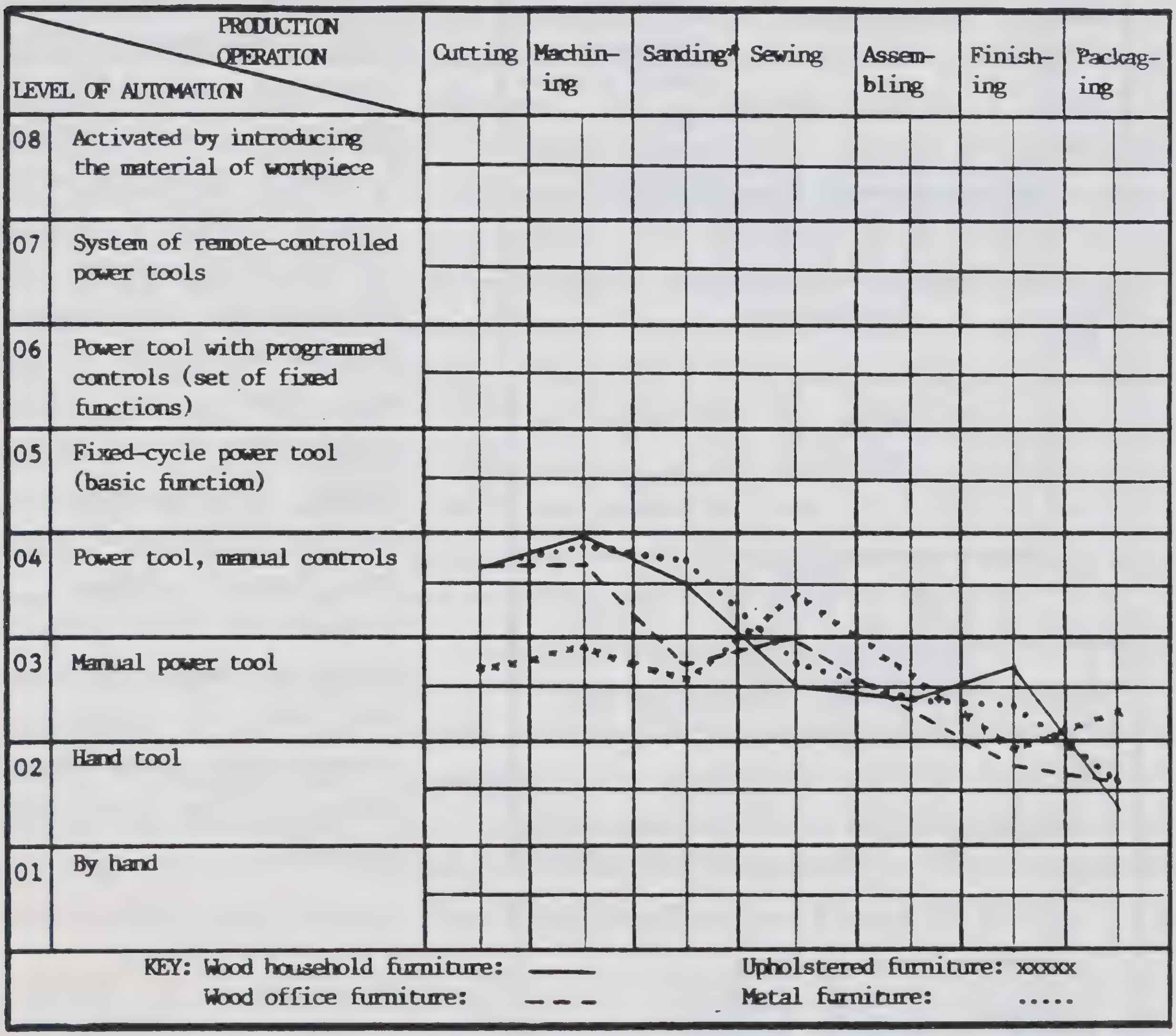
Inadequate capital investment is a major structural weakness of the Quebec furniture and fixture industry. Coupled with the small size of sector firms, this virtual stagnation in the acquisition of modern equipment has been a significant factor in Quebec's loss of market share to Ontario since the mid 1970s.

c) Industry Slow to Automate

The results of a study carried out in 1979 by a Laval consulting firm, the Groupe d'Etudes en Innovation Technologique L.V. Ltd, into the degree of automation of manufacturing processes for producing wooden household and office furniture, upholstered furniture and metal furniture are given in Graph 6. The

chief finding is the low level of mechanization in the firms surveyed. For cutting, machining and sanding operations, the firms use manually regulated machine tools, numerically controlled tools still being quite rare. Sewing and assembling are performed with manual power tools, while finishing and packaging are still done with hand tools. The study also points out that there is very little planning of handling operations even though conveyors are used quite extensively in the industry.

GRAPH 6
DEGREE OF AUTOMATION OF PRODUCTION OPERATIONS
QUEBEC FURNITURE AND FIXTURE INDUSTRY
(mean)



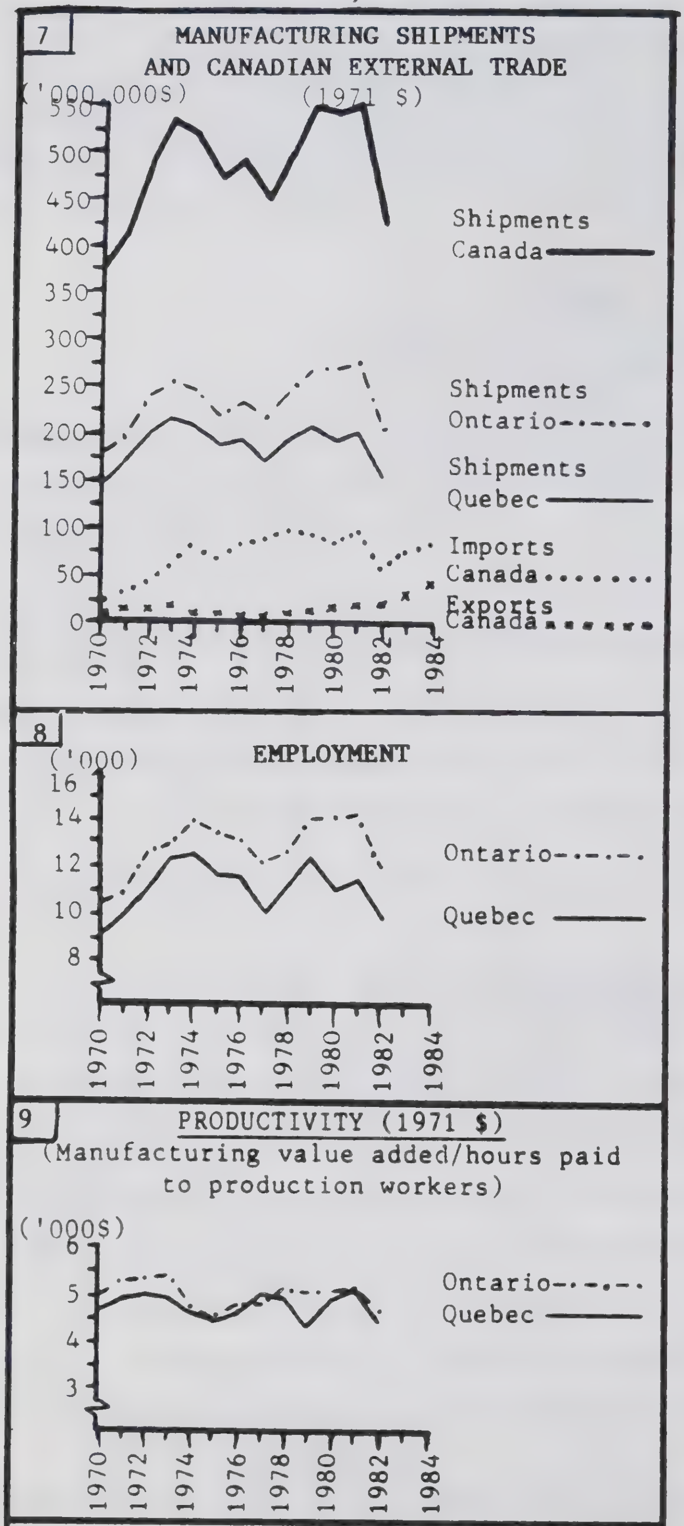
*: Or punching for metal furniture and upholstering for upholstered furniture.

SOURCE: Groupe d'Etudes en Innovation Technologique L.V. Ltd, Report on the Quebec furniture and fixture industry, 1979.

B) UNDERLYING TRENDS BY SUBSECTOR

1) HOUSEHOLD FURNITURE

GRAPHS 7, 8 AND 9



Sources: Statistics Canada, Census of Manufacturers #35-211 to 35-214, Exports and Imports: Merchandise Trade #65-202 and 65-203.

Household furniture manufacturing is still the largest subsector of the Quebec furniture and fixture industry. Its share of total industry output has even increased in recent years, and in 1982 it represented 60% of total shipments and 65% of total employment. Half of the Canadian household furniture industry is located in Ontario, while approximately 40% is centred in Quebec. Characterized by small firms, with an average of 20 employees each, the Quebec industry is concentrated in the Montreal and Quebec City metropolitan areas and the St Maurice Valley and Bois Francs regions. Alhough productivity in the subsector in Quebec has been keeping pace with the level in Ontario, it is substantially lower than productivity in the office furniture subsector.

As underscored by the socio-economic conferences of 1977 and 1983, Quebec household furniture manufacturers are having difficulty overcoming their structural problems. Their small size rules out economies of scale and is an obstacle to optimal management of factors of production. Owing to a lack of innovation, their products are not sufficiently differentiated from those offered by their international competitors. Market studies are seldom thought worthwhile, and advertising is limited.

Not only must the subsector contend with organizational difficulties, but it is also very much at the mercy of the business cycle through the cyclical effect on consumer discretionary income, as illustrated in Graph 2. Certain changes in consumer tastes and lifestyles also have an influence on the purchase of furniture and fixtures. Three consumer preference surveys(1) conducted at furniture shows in Montreal, Toronto and Calgary in 1982 showed that tastes now lean more toward modern and contemporary rather than traditional and rustic styles; the surveys also revealed the following buying criteria (given here in decreasing order of importance): comfort, durability, originality of design and price. Demographic factors also have an impact on consumer behaviour. For instance, from 1982 to 1992, according to the Quebec Statistics Bureau's middle-of-the-road projection, the Quebec population aged 20 to 29, the chief group for the formation of new households, will shrink by an average of 1.5% annually, while the population over 30 will grow by 2.2%. However, this foreseeable drop in purchases of starter furniture should be more than offset by the trend toward more frequent replacement of furniture.

As for international trade, Canadian imports of household furniture represented, in real terms, 12.2% on average of apparent annual consumption in the 1970s, while exports stagnated. Only since 1982 has the trade deficit begun to narrow as exports rise. Total export volume in this subsector remains very low, however: shipments of household furniture to foreign markets accounted for only a quarter of all Canadian furniture exports in 1984.

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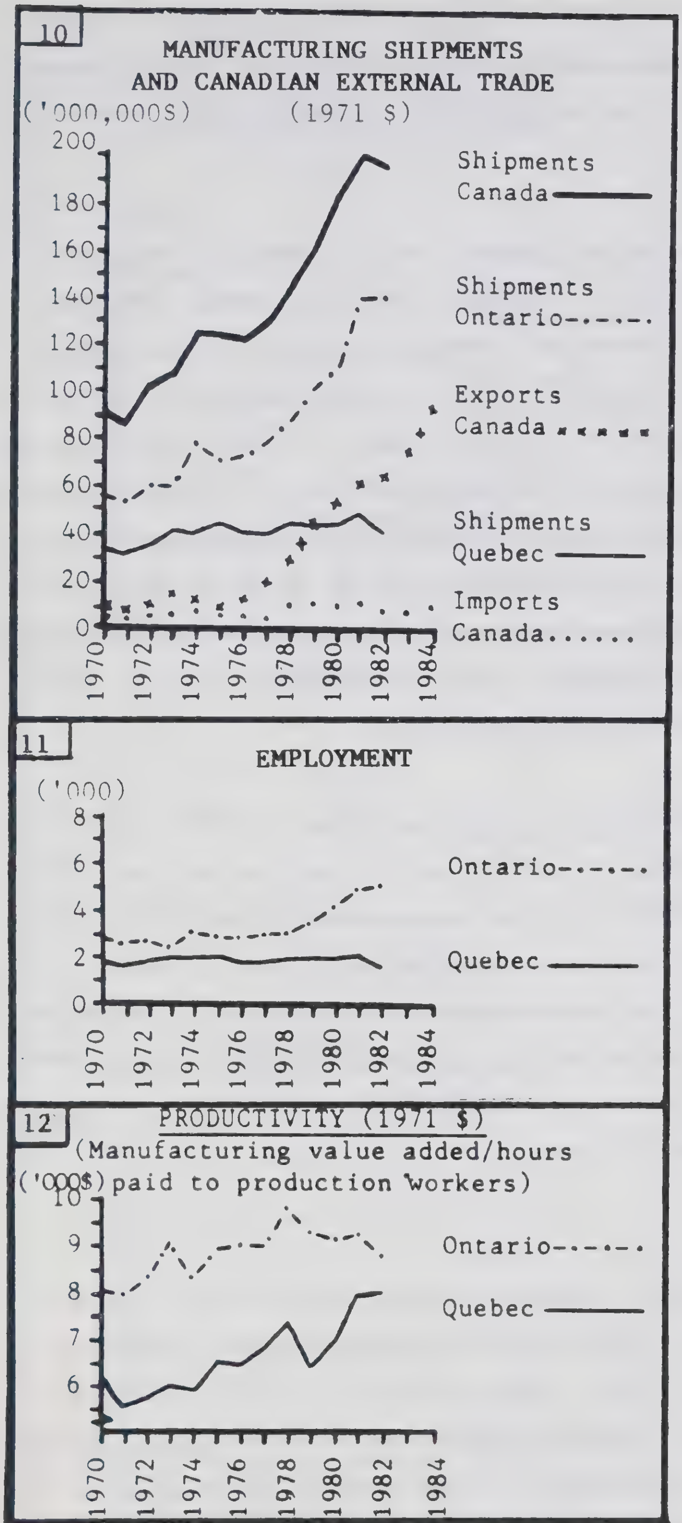
(1): SOURCE: Department of Industry and Commerce of Quebec, "L'industrie québécoise de l'ameublement de maison", 1985 (Marcel Bureau) p.79

It does not look as though the subsector's structural problems will be resolved over the short term. Although a few firms may merge or go into joint production, their impact on overall output will be felt only if they are able to safisfy consumer buying criteria. Generally speaking, household furniture manufacturers have been slow to introduce numerically controlled machinery, as indicated by the low level of capital investment from 1983 to 1985. Between now and 1992, however, most of the larger companies plan to automate more of their production equipment, although relatively few will introduce robots on a grand scale. Smaller producers will mechanize more slowly: certain machine tools will gradually be replaced by more compact, more sophisticated models, though not all these will necessarily be numerically controlled tools.

All in all, modernizing production equipment should make it possible to increase output without increasing personnel while reducing the risk of errors. Quebec manufacturers will nevertheless have to innovate and offer products with competitive price-quality ratios if they want to raise their share of Canadian and foreign markets. The respondents to our industry questionnaire generally believe that in the future greater emphasis will be placed on design and that this should result in a slightly broader range of products and much more frequent changes in style. Moreover, most of them are optimistic about the prospects for the furniture and fixture industry in Quebec and anticipate fairly moderate growth in shipments to the Canadian market and increased penetration of foreign markets.

2) OFFICE FURNITURE

GRAPHS 10, 11 AND 12



Sources: Statistics Canada, Census of Manufacturers #35-211 to 35-214, Exports and Imports: Merchandise Trade #65-202 and 65-203.

Canadian office furniture production is chiefly located in Ontario, which accounted for 72% of the subsector's manufacturing shipments in 1982 compared with 21% for Quebec. There are only around 20 office furniture firms with more than 20 employees in Quebec; these firms are concentrated in the greater Montreal area and in the region south of the city. Quebec's share of total employment in this subsector in Canada has been steadily declining, going from 37% in 1976 to 24% in 1982, the last year for which statistics are available. The size of office furniture manufacturing firms has also decreased: from an annual average of 80 employees between 1970 and 1980, the figure had dropped to just over 50 by 1982.

Dating back only 20 years or so, Quebec furniture manufacturing plants have fairly modern equipment, although not all processes are automated. Productivity in the subsector is significantly higher than that in the other subsectors of the furniture and fixture industry in Quebec and

appears to be moving toward a level comparable with that of Ontario manufacturers in the same subsector. Firms often call on industrial design specialists to develop original products that meet specific needs in the modern office.

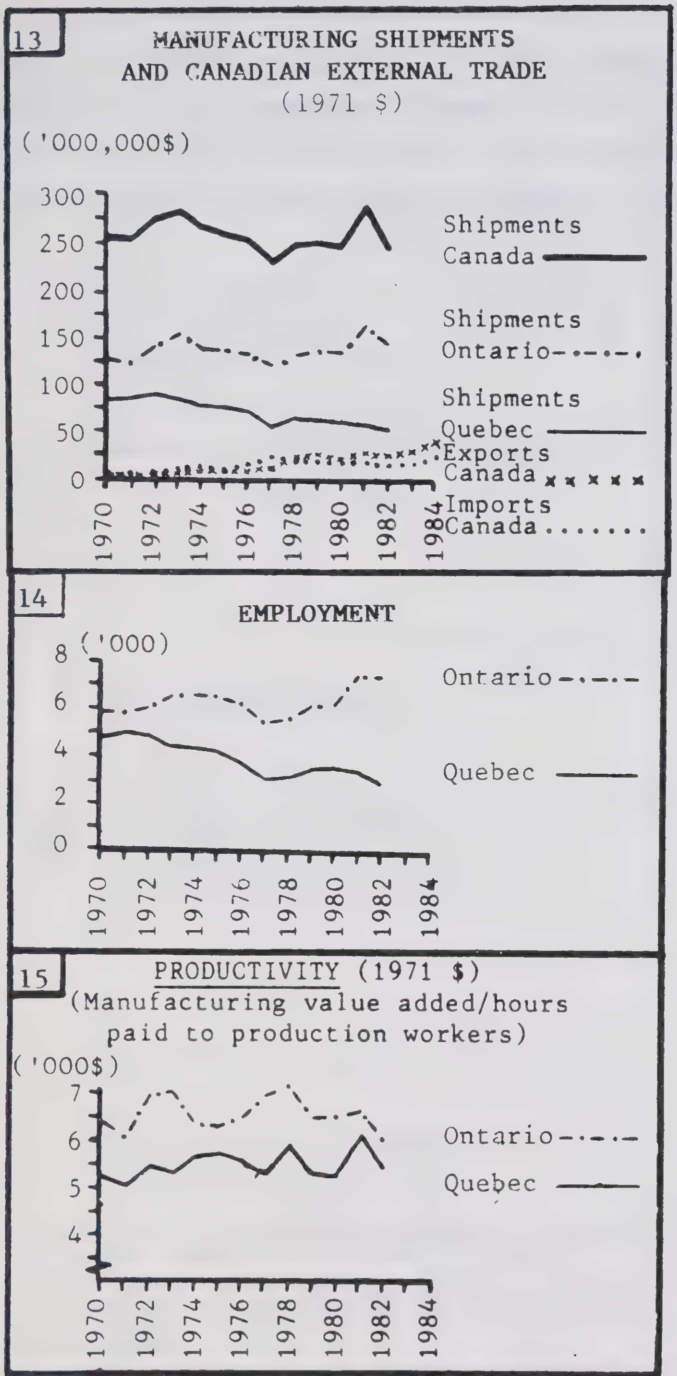
Although the subsector is quite dynamic in a number of respects, the value in real terms of Quebec office furniture manufacturing shipments has hardly changed over the period in question, remaining below 50 million in 1971 dollars. This stagnation contrasts sharply with the performance of the Ontario subsector, which doubled its production over the same period to reach a value of 197 million in 1971 dollars in 1982. The dramatic rise in Canadian exports, in real terms, between 1976 and 1982 is attributable to the vitality of Ontario manufacturers. However, to increase their share of the Canadian market and to penetrate the international market, some Quebec producers have recently merged. Canadian market demand is almost entirely met by domestic office furniture manufacturers, with import volume remaining very low.

The potential market, domestic and foreign alike, looks promising in the short and medium term. The value in real terms of non-residential building permits rose sharply in 1984 and 1985, indicating increased demand in 1985 and 1986. In addition to the regular outlets represented by new firms, expanding firms and furniture replacement, a new market is now opening up for the functional and aesthetic integration of modern office automation equipment into the workplace. As this market develops worldwide, driven by an expanding tertiary sector, it should generate strong growth in demand for office furniture and fixtures.

Despite fierce competition, Quebec manufacturers are counting on distinctive, quality products and certain marketing strategies, including very short delivery times, to establish their reputation and reach a wider market. A study of office furniture users in Quebec, Ontario, Alberta and the United States conducted in 1978 by the firm Ernst & Ernst showed that the most important factors affecting demand were, in decreasing order: quality, price, design and delivery time. Confident that they can meet these buying criteria, the Quebec office furniture manufacturers who responded to our industry questionnaire are optimistic about their future.

3) MISCELLANEOUS FURNITURE

GRAPHS 13, 14 AND 15



Sources: Statistics Canada, Census of Manufacturers #35-211 to 35-214, Exports and Imports: Merchandise Trade #65-202 and 65-203.

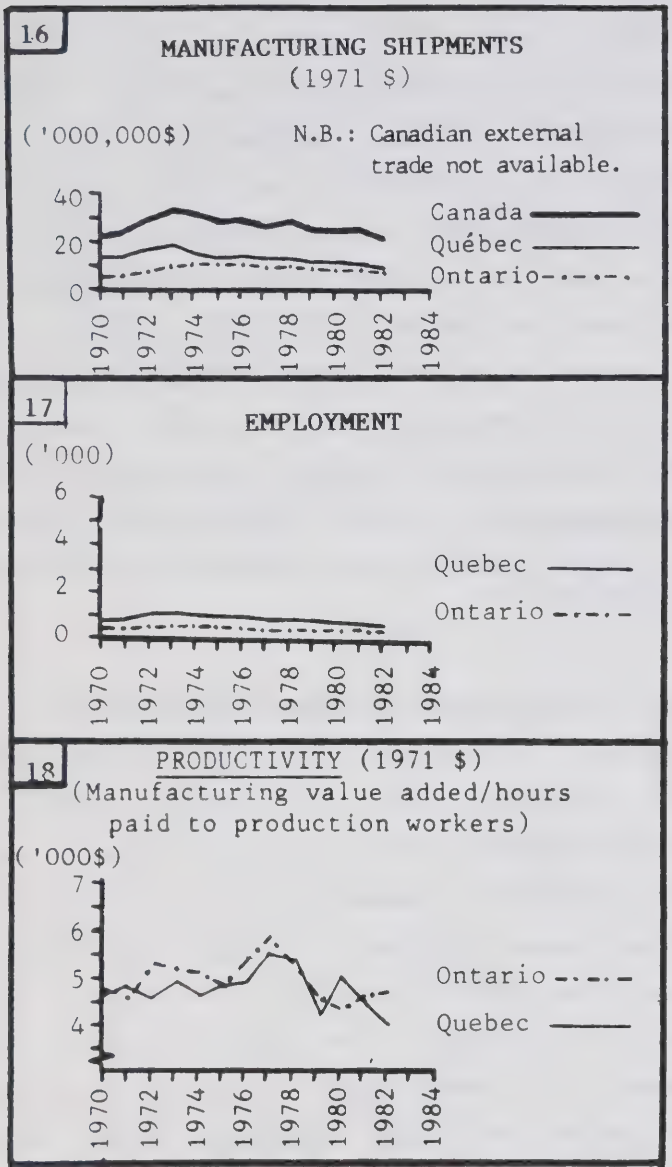
This subsector comprises manufacturers of furniture for public buildings (schools, hospitals, etc), commercial establishments (stores, restaurants, etc), furniture for certain professional needs as well as mattresses and box springs. Most of these firms are concentrated in the Montreal and Quebec City metropolitan areas. Throughout the 1970s, the average size was approximately 30 employees per firm.

Since 1973, miscellaneous furniture manufacturers in Quebec have been faced with a steady decline in business activity, while Ontario manufacturers have managed to maintain their output levels. This slide in Quebec shipments in real terms reflects the low volume of investment in institutional facilities, owing to demographic changes and budget restraints, as well as the very stiff competition from Ontario firms, which alone have been responsible for the gradual increase in Canadian exports measured in constant dollars.

Ontario was able to increase its market share by 10% at Quebec's expense between 1970 and 1982 despite the drop in government spending and will probably manage to hang on to this share over the next few years. If Quebec manufacturers are to maintain their present share of national and international shipments, they will have to streamline their operations, innovate and improve their marketing. Otherwise they will continue to lose ground to their competitors.

4) LAMPS AND SHADES

GRAPHS 16, 17 AND 18



Sources: Statistics Canada, Census of Manufacturers #35-211 to 35-214, Exports and Imports: Merchandise Trade #65-202 and 65-203.

The electric lamp and shade subsector, which Statistics Canada has incorporated into the electrical and electronic products industry since 1983, accounted for only 4% of Quebec furniture and fixture shipments in 1982. The 15 or so lamp and shade manufacturers employing more than 20 people are all established in the greater Montreal area. In the 1970s, the average annual size of these firms was 31 employees per company, compared with just 18 in 1982. After peaking in 1973, the value of shipments in real terms declined steadily and represented only half this level by 1982. In this subsector, the Ontario industry is smaller than the Quebec industry. There is little likelihood that the subsector will make any significant increases in its share of the domestic and international markets during our projection period, and it may even be hard pressed to maintain its current market share.

C) PROSPECTS

Since the mid 1980s the Quebec furniture and fixture industry has been striving to increase its market share, chiefly in Canada but also internationally. By 1992, Quebec manufacturers should have made significant progress in dealing with their structural problems. Several medium-sized firms have gone public to finance the expansion and modernization of their production facilities, while others have borrowed money from the government or financial institutions for expansion projects and the acquisition of modern automated equipment. The manufacturers we consulted believe that the industry will invest increasingly in numerically controlled machine tools (NCMTs) between now and the early 1990s, although only a few companies will be able to automate their operations beyond NCMTs. Most firms plan to acquire word processors for their secretarial staff and to make increasing use of data-processing systems for accounting, inventory control, sales analysis and determining marketing strategy.

Switching from conventional mechanization to computer-operated equipment will result in productivity gains. In addition, furniture manufacturers are putting more and more emphasis on product quality and design research to satisfy consumer needs. These new developments should certainly help to boost sales volume. By thus improving its ability to compete, Quebec should be able to increase its share of the Canadian domestic market. Forecasts for Canadian and Quebec economic growth for the five years from 1985 to 1990 are quite favourable for the furniture industry. According to the reference model worked out by the firm Informetrica, Canada's GDP should grow at an average annual rate of 2.5% over the five-year period, with the furniture sector seeing slightly stronger overall growth. The respondents to our industry questionnaire were generally optimistic and anticipate increased sales despite tough domestic and foreign competition.

CHAPTER III

EMPLOYMENT TRENDS

A) OVERALL EMPLOYMENT TRENDS

1) RECENT TRENDS

The historical data published by the federal government in the Annual Census of Manufactures stop in 1982. Beginning in 1983, Statistics Canada adopted the new Standard Industrial Classification established in 1980 and further broke down the subsectors of the furniture industry, making various data confidential. The historical data published by Statistics Canada in the monthly Labour Force Survey cover 1985. Since 1984, however, survey sampling has been conducted on the basis of a new geographic distribution which increases the representation of rural and semirural regions. Table 12 shows employment statistics from these two sources for the furniture industry between 1970 and 1985 together with data on manufacturing shipments over the same period.

TABLE 12
TRENDS IN OVERALL EMPLOYMENT AND SHIPMENTS
QUEBEC FURNITURE AND FIXTURE INDUSTRY
1970 to 1985

YEAR	VALUE OF MANUFACTURING SHIPMENTS (1) (millions of 1971 $)		EMPLOYMENT			
			CENSUS OF MANUFACTURES (1)		LABOUR FORCE SURVEY (2)	
	Number	%	Number	%	Number	%
1970	281,9		16,780			
1971	306,8	8.8	17,650	5.2		
1972	348,9	13.7	18,920	7.2		
1973	363,5	4.2	20,030	5.9		
1974	351,8	-3.2	20,050	0.1		
1975	322,8	-8.2	18,950	-5.5	22,000	
1976	325,8	0.9	18,300	-3.5	22,000	-
1977	291,2	-10.6	15,940	-12.9	25,000	13.6
1978	324,9	11.6	17,470	9.6	24,000	-4.0
1979	335,1	3.1	19,040	9.0	24,000	-
1980	316,3	-5.6	17,710	-7.0	23,000	-4.2
1981	325,9	3.1	17,920	1.2	23,000	-
1982	259,5	-20.4	15,270	-14.8	21,000	-8.7
1983	n.a.		n.a.		23,000	9.5
1984	n.a.		n.a.		22,000	-4.4
1985	n.a.		n.a.		25,000	13.6

SOURCE: Statistics Canada, Cat No 35-211 to 35-214(1) and 71-001(2)

Figures from the Annual Census of Manufactures can be used to compare the overall trend in employment with the trend of furniture industry manufacturing shipments in constant dollars. The two variables have followed parallel trends, employment rising in periods of production growth while declining in periods of economic slowdown. Output in the industry peaked in 1973, and this was reflected in the employment level in 1973 and 1974. A few years later, in 1977, furniture manufacturers suffered a sharp drop in business activity, leading to extensive layoffs. Growth returned in the late 1970s but was followed by the crunch of the 1982 recession, which resulted in the loss of 2,000 jobs. Labour Force Survey statistics indicate that the industry did not return to full production levels until 1985.

2) Projections

Considering that Statistics Canada's Labour Force Survey (LFS) covers all industrial sectors, whereas the Census of Manufacturers does not, and considering that the LFS employment level for the furniture industry is close to that given under skilled labour force statistics in the 1981 Census of Canada, we decided to use LFS figures for forecasting employment to 1992.

Our initial projection, worked out for the industry questionnaire, forecast total employment of 27,000 in 1992. After analysing the results of the survey, we revised the projection downward to 26,000 in 1992. Employment prospects by occupational group are detailed in the next two sections of this chapter. We should add that these projections do not take into account the possible effects of a free-trade agreement, now being negotiated with the United States.

B) EMPLOYMENT BY MAJOR OCCUPATIONAL GROUP

1) RECENT TRENDS

The sole official source of employment statistics by occupation is the decennial censuses conducted by Statistics Canada. These statistics show that

in 1981 just 38 occupations, out of a total of 221 that are involved in the Quebec furniture industry, accounted for 84% of total industry employment. Table 13 presents basic figures on employment trends by major occupational group between 1971 and 1981 as well as employment projections to 1992.

The data show that the strong employment growth during the intercensal period was chiefly due to increases in the number of production workers engaged in machining and related occupations. This major group's relative share of total employment rose from 34% to 48%, for a total of 12,600 jobs, ie double the 1971 level. The number of managers and professionals also increased twofold, but since their share of total employment is small, their impact on the overall job picture in the industry is less noticeable.

In contrast, production employees involved in upholstering, finishing, shipping and maintenance occupations saw their relative share of total industry employment fall significantly between 1971 and 1981, as their rate of growth was considerably lower than the industry average. Lastly, little change occurred in the clerical occupations group, while sales occupations were the only group to suffer a net loss in numbers.

2) PROSPECTS

As we mentioned in Chapter II, the production techniques used in the average factory in the Quebec furniture and fixture industry the 1970s scarcely went beyond conventional mechanization, and industry manufacturers began to automate their offices only in the early 1980s.

Furniture manufacturing firms therefore have a considerable amount of technological catching-up to do. Our industry questionnaire showed that Quebec firms are well aware of this and that they have already started to automate their operations.

According to the respondents to our questionnaire, the furniture industry is increasingly investing in numerically controlled machine tools

TABLE 13
RECENT AND PROJECTED EMPLOYMENT
BY MAJOR OCCUPATIONAL GROUP
QUEBEC FURNITURE AND FIXTURE INDUSTRY

MAJOR OCCUPATIONAL GROUP	EMPLOYMENT LEVEL: RECENT AND PROJECTED			RATE OF GROWTH (%)		STRUCTURE (%)		
	1971	1981	1992 *	1981/1971	1991/1981	1971	1981	1992
Managerial and professional	660	1,330	1,570	101.5	18.0	4.26	5.75	6.03
Clerical	1,375	1,725	1,900	25.5	10.1	8.88	7.49	7.31
Sales	825	575	620	-30.3	7.8	5.39	2.50	2.38
Production: machining and related occupations	5,260	11,145	12,600	111.9	13.1	34.10	48.47	48.46
Production: upholstering, finishing, shipping, maintenance	3,950	4,485	5,350	13.5	19.3	25.61	19.49	20.58
Subtotal	12,070	19,260	22,040	59.6	14.4	78.24	83.70	84.76
TOTAL: furniture and fixture industry	15,400	23,000	26,000	49.0	13.0	100.0	100.0	100.0

* Estimate based on information gathered during industry consultation.

SOURCES: Statistics Canada, Census of Canada, 1971 and 1981, and Labour Force Survey, Cat No 71-001; CEIC, Economic Services Branch, Quebec Region.

(NCMTs): this is particularly true of large firms, while some small firms may instead opt for advanced, but not necessarily automated equipment. Robots will not be used extensively in the industry in the 1980s, but some manufacturers will gradually begin to make use of computed-aided design. New technology will likewise have an effect on clerical occupations as word processors become common in all offices; some companies will also invest in data-processing systems to take care of accounting and inventory-control operations.

The impact of these technological changes on the various occupational groups is examined in detail in the following pages of this study. All in all, the Quebec furniture and fixture industry will not suffer any drop in overall employment between now and 1992 since the expected growth in the volume of shipments should offset any negative factors. Improved marketing, greater emphasis on product quality, and increased productivity resulting from new computerized technology should help manufacturers to achieve better penetration of domestic and foreign markets.

Nevertheless, employment growth between 1981 and 1992 will be weak in comparison with the growth recorded from 1971 to 1981. Total employment will rise by only 3,000 jobs, an increase of 13% over the period as a whole. Quebec furniture manufacturers must first recover from the devastating effects of the 1982 recession, and the 2,000 lost jobs will not have been regained until the mid 1980s.

C) EMPLOYMENT BY OCCUPATIONAL GROUP

1) MANAGERIAL AND PROFESSIONAL OCCUPATIONS

a) Managerial Occupations

The total number of jobs in the managerial and professional occupations doubled between the 1971 and 1981 censuses. According to census statistics, PRODUCTION MANAGEMENT OCCUPATIONS (1143) were chiefly responsible for this growth in employment. Responses to our industry questionnaire suggest,

however, that their ranks appear to have been swollen by a significant number of supervisors in the 1981 figures whereas the employment level recorded in 1971 seems to be too low. Respondents' views would appear to be accurate if we consider the current ratio of one production manager for every firm having from 20 to 200 employees, given that the owners of smaller firms tend to take care of production management themselves. On the other hand, the period of strong growth in the industry between 1972 and 1975 must have certainly led to increased hiring in this occupational group as companies sought to divide up management responsibilities by production phase. We therefore think we are justified in revising the number of production managers downward to 300 for 1981. Thereafter, the 1982 recession no doubt put many of them out of work as a result of bankruptcies and the streamlining of managerial staff. Still, the increased output expected between now and 1992 and plans for a broader range of products should push the number of production managers in the industry up to 500.

The total number of GENERAL MANAGERS AND OTHER SENIOR OFFICIALS (1130) was reported to be 170 in 1981, and employment in the group over the intercensal period remained relatively stable. These two facts suggest that many smaller manufacturers must register themselves as cabinetmakers rather than general managers, perhaps because of their direct involvement in production. In larger firms, those that are most likely to increase their volume of shipments, the number of general managers should rise slightly, bringing the total for the industry to 200 by 1992.

As in the past, managers in Quebec furniture manufacturing firms are still called upon to be very versatile. Responsibility for sales and advertising, for instance, is rarely assigned to specialists, the majority of entrepreneurs preferring to take care of these duties themselves. Little change is anticipated in this respect during the projection period, and the number of SALES AND ADVERTISING MANAGERS (1137) should increase only slightly, from 95 to 110, between 1981 and 1992. On the other hand, increased application of computer technology to sales operations should help in the production of analytical reports and the development of marketing strategies. In short,

TABLE 14
RECENT AND PROJECTED EMPLOYMENT
MANAGERIAL AND PROFESSIONAL OCCUPATIONS
QUEBEC FURNITURE AND FIXTURE INDUSTRY

OCCUPATIONAL GROUP		EMPLOYMENT 1971 TO 1981					MECHANICAL PROJECTION * for 1992 (fixed coefficient)	REVISED PROJECTION for 1992 (after industry consultation)	
		NUMBER		Var. 81/71 (%)	STRUCTURE				
CCDO	OCCUPATION	1971	1981		1971	1981		NUMBER	STRUCTURE
1130	General managers and other senior officials	175	170	-2.9	1.13	0.74	200	200	0.77
1137	Sales and advertising management occupations	60	95	58.3	0.40	0.41	110	110	0.42
1143	Production management occupations	60	455	658.3	0.40	1.97	530	500	1.92
1152	Other managers and administrators	30	120	300.0	0.18	0.53	145	130	0.50
1171	Accountants, auditors and other financial officers	120	140	16.7	0.77	0.60	160	140	0.54
1175	Purchasing officers	55	100	8.18	0.37	0.43	115	120	0.46
2145	Industrial engineers	35	50	42.9	0.21	0.21	55	70	0.27
2165	Engineering technologists and technicians	5	15	200.0	0.03	0.06	15	30	0.12
2183	Analysts and programmers	0	20	-	0	0.08	20	40	0.15
3313	Product and interior designers	120	165	37.5	0.77	0.72	195	230	0.88
SUBTOTAL		660	1,330	101.5	4.26	5.75	1,545	1,570	6.03

* Reflects the 1981 occupational structure and is based on our overall employment projections using Labour Force Survey data; the LFS overall employment level for 1981 is close to that reported in the census.

SOURCES: Statistics Canada, Census of Canada, 1971 and 1981, and Labour Force Survey, Cat No 71-001; CEIC, Economic Services Branch, Quebec Region.

FACTORS THAT MAY AFFECT EMPLOYMENT IN THE MANAGERIAL AND PROFESSIONAL OCCUPATIONS TO 1992
QUEBEC FURNITURE AND FIXTURE INDUSTRY
PERCENTAGE BREAKDOWN OF RESPONSES TO INDUSTRY QUESTIONNAIRE

TABLE 15

INDUSTRY AS A WHOLE	A	VOLUME OF SHIPMENTS	EXPECTED INCREASE			
			None	Slight	Moderate	Large
		• Canada	8	30	54	8
		• Foreign markets	19	19	37	25
	B	RANGE OF PRODUCTS	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		• Broader		50	20	30
		• Styles changed more frequently		15	23	62
		• Other (specify)				
OCCUPATIONAL GROUP IN QUESTION	C	AUTOMATION	EXPECTED USE			
			None	Slight	Moderate	Large
		• Accounting		38	16	46
		• Sales	8	25	47	20
		• Inventory		18	27	55
		• Manufacturing management (CAMM)	10	18	27	45
		• Design (CAD)	40	20	30	10
		• Other (specify)				
	D	WORK	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		• Organization	10	27	36	27
		• Tasks	8	42	50	
		• Increased productivity		9	36	55
		• Subcontracting	9	36	18	36
		• Other (specify)				
	E	OTHER (SPECIFY)	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		•				
		•				

TABLE 16

OCCUPATIONAL GROUP		IDENTIFICATION OF FACTORS %					ANTICIPATED IMPACT ON PERSONNEL				
							Increase / Decrease (S:Slight, M:Moderate, L:Large)				
CCDO	OCCUPATION	A	B	C	D	E	Increase	Decrease	None	Retrain	ESTIMATED JOBS IN 1992 (after consultation)
1130	General managers and other senior officials	50		33	17		S			✓	200
1137	Sales and advertising management occupations	50	38	12			S			✓	110
1143	Production managers	21	36	29	14		S			✓	500
1152	Other managers and administrators	33	17	50			S			✓	130
1171	Accountants, auditors and financial officers	14		72	14				✓		140
1175	Purchasing officers	17	17	33	33		S				120
2145	Industrial engineers	25	12	25	38		M				70
2165	Engineering technologists and technician	22	12	33	33		S			✓	30
2183	Analysts & programmers	12	26	50	12		M				40
3313	Product and interior designers	40	40	20			M				30

most furniture manufacturers will devote more energy to promoting their products and will take advantage more often of the exposure gained by participating in trade fairs at home and abroad.

b) Technical Occupations

Between 1971 and 1981 very few people were employed in technical support occupations in the industry; over the period to 1992, however, this number should increase somewhat as the larger firms invest more heavily in automated equipment. Manufacturers are becoming increasingly aware of the importance of optimum management of factors of production. Thus, the number of INDUSTRIAL ENGINEERS (2145) in the furniture and fixture sector should see moderate growth, going from 50 in 1981 to 70 in 1992.

At the same time, SYSTEMS ANALYSTS AND COMPUTER PROGRAMMERS (2183) will remain scarce in the industry. The total number of jobs in the group will still be only 40 or so by 1992. Two of the main reasons for this situation are the lack of accounting software that meets the needs of small business and the ease of adjusting and operating numerically controlled machine tools. Only a short time is required to train employees to use this new technology. For more complex tasks, such as computer-aided manufacturing, companies are thinking of contracting some work out to technical consulting firms and of hiring their own programmers for other jobs.

ENGINEERING TECHNOLOGISTS AND TECHNICIANS (2165) will remain a marginal occupational group within the Quebec furniture industry. Demand for these skills can very often be met by machinists or their supervisors or by industrial machinery mechanics working for the furniture manufacturer or for a contractor specializing in machine maintenance.

c) Design Occupations

In the past, little effort has been made in the Quebec furniture industry to create original designs. Manufacturers have been happy to imitate

the good ideas of their domestic and foreign competitors. Now, however, Quebec firms are recognizing the value of a distinctive product that meets consumer expectations with a competitive price-quality ratio. The capacity to innovate is thus becoming essential to the success of a furniture manufacturer. Demand in the industry for PRODUCT AND INTERIOR DESIGNERS (3313) will thus shift its focus toward the ability to associate artistic talent with modern manufacturing techniques and a broader range of materials in aiming to satisfy specific consumer needs. The use of computer-aided design technology should still be quite limited in the early 1990s and will therefore have little impact on employment. The number of jobs in this occupational group is forecast to increase by 40% between 1981 and 1992 to reach 230.

d) Other Professional Occupations

Employment among ACCOUNTANTS, AUDITORS AND OTHER FINANCIAL OFFICERS (1171) should remain at its 1981 level of 140 jobs through to 1992. The duties performed by these professionals will undergo change, however, as accounting, sales and inventory operations are computerized. The time saved through the speed of computer calculations will be offset by the increased number of analytical reports required by managers for monitoring and improving company performance. Firms that go public to finance expansion or other activities will also see an increase in the volume of their accounting work to meet the information demands of shareholders.

As for PURCHASING OFFICERS (1175), their numbers will rise slightly between now and 1992 to reach 120, thus following the general upward trend in the industry.

2) CLERICAL OCCUPATIONS

Employment among SECRETARIES AND STENOGRAPHERS (4111) increased slightly during the 1971-1981 intercensal period, and this trend should continue, though at a slower pace, into 1992, when total jobs in the group will number 530. Responses to our industry questionnaire indicate that far greater

use will be made of word-processing technology over the medium term but that this will not cause any loss of jobs. Managers will take advantage of the resulting increase in productivity to widen the duties of their clerical staff to include entering statistical data on computer.

Between 1971 and 1981, BOOKKEEPERS AND ACCOUNTING CLERKS (4131) saw their numbers double, partly at the expense of the GENERAL OFFICE CLERKS GROUP (4197). This trend may be attributed to a reorganization of the duties of general office clerks to meet increased demand for statistical reports rather than to any layoffs in this occupational group. Employment among general office staff should remain fairly constant between 1981 and 1992. Bookkeepers and accounting clerks will experience very modest growth in their numbers over the same period. Investment in office automation equipment will therefore reduce employment growth but not result in any lost jobs. However, as clerical employees become more productive, their duties will change to include whatever data processing is required to produce the basic statistical reports that managers need to plan production and improve sales.

SHIPPING AND RECEIVING CLERKS (4153) and STOCK CLERKS (4155) should see their numbers rise by 15% and 10% respectively between 1981 and 1992. Growth in the first group will chiefly be stimulated by the forecast increase in shipments, while growth in the second will principally be due to the broader range of products offered.

3) SALES OCCUPATIONS

Of all the occupational groups involved in the furniture and fixture industry, only sales occupations saw a significant drop in their numbers between 1971 and 1981. The SUPERVISORS: SALES OCCUPATIONS GROUP (5130) bore the brunt of this drop. According to the responses to our industry questionnaire, several factors were responsible for this decline. First, during the 1970s, furniture producers increasingly made use of manufacturer's agents paid on commission who also represented other companies. Then, advertising strategy began to change. Greater participation in trade fairs,

TABLE 17
RECENT AND PROJECTED EMPLOYMENT
CLERICAL AND SALES OCCUPATIONS
QUEBEC FURNITURE AND FIXTURE INDUSTRY

OCCUPATIONAL GROUP		EMPLOYMENT 1971 TO 1981					MECHANICAL PROJECTION * for 1992 (fixed coefficient)	REVISED PROJECTION for 1992 (after industry consultation)	
		NUMBER		Var. 81/71 (%)	STRUCTURE				
CCDO	OCCUPATION	1971	1981		1971	1981		NUMBER	STRUCTURE
4111	Secretaries and stenographers	390	470	20.5	2.51	2.04	550	530	2.04
4131	Bookkeepers and accounting clerks	305	665	118.0	1.99	2.90	785	730	2.81
4153	Shipping and receiving clerks	290	345	19.0	1.87	1.50	405	380	1.46
4155	Stock clerks	100	105	5.0	0.64	0.45	120	120	0.46
4197	General office clerks	290	140	-51.7	1.87	0.60	160	140	0.54
CLERICAL OCCUPATIONS SUBTOTAL		1375	1725	25.5	8.88	7.49	2,020	1,900	7.31
5130	Supervisors: sales occupations	370	115	-68.9	2.42	0.51	140	120	0.46
5133	Commercial travellers	235	260	10.6	1.53	1.13	305	260	1.00
5135	Sales workers	220	200	-9.1	1.44	0.86	230	240	0.92
SALES OCCUPATIONS SUBTOTAL		825	575	-30.3	5.39	2.50	675	620	2.38

* Reflects the 1981 occupational structure and is based on our overall employment projections using Labour Force Survey data; the LFS overall employment level for 1981 is close to that reported in the Census.

<u>SOURCES</u>: Statistics Canada, Census of Canada, 1971 and 1981, and Labour Force Survey, Cat No 71-001; CEIC, Economic Services Branch, Quebec Region.

FACTORS THAT MAY AFFECT EMPLOYMENT IN THE CLERICAL AND SALES OCCUPATIONS TO 1992
QUEBEC FURNITURE AND FIXTURE INDUSTRY
PERCENTAGE BREAKDOWN OF RESPONSES TO INDUSTRY QUESTIONNAIRE

TABLE 18

			None	Slight	Moderate	Large
INDUSTRY AS A WHOLE	A	VOLUME OF SHIPMENTS	EXPECTED INCREASE			
		• Canada	8	30	54	8
		• Foreign markets	19	19	37	25
	B	RANGE OF PRODUCTS	EXPECTED CHANGE			
		• Broader		50	20	30
		• Styles changed more frequently		15	23	62
		• Other (specify)				
OCCUPATIONAL GROUP IN QUESTION	C	AUTOMATION	EXPECTED USE			
		• Word processing	11		33	56
		• Accounting		42	33	25
		• Sales	9	18	46	27
		• Inventory		50	10	40
		• Other (specify)				
	D	WORK	EXPECTED CHANGE			
		• Organization	29	14	14	43
		• Tasks	22	34	22	22
		• Increased productivity		25	25	50
		• Subcontracting	38	38		24
		• Other (specify)				
	E	OTHER (SPECIFY)	EXPECTED CHANGE			
		• Increased advertising		33	50	17
		•				
		•				

TABLE 19

OCCUPATIONAL GROUP		IDENTIFICATION OF FACTORS %					ANTICIPATED IMPACT ON PERSONNEL				
CCDO	OCCUPATION	A	B	C	D	E	Increase (S:Slight M:Moderate L:Large)	Decrease (S:Slight M:Moderate L:Large)	None	Retrain	ESTIMATED JOBS IN 1992 (after consultation)
4111	Secretaries and stenographers			67	33		S			✓	530
4131	Bookkeepers and accounting clerks	33	17	33	17		S			✓	730
4153	Shipping and receiving clerks	40	20	20	20		S				380
4155	Stock clerks	20	40	20	20		S				120
4197	General office clerks	20	10	40	30				✓		140
5130	Supervisors: sales occupations	38	25	25	12				✓		120
5133	Commercial travellers	17	32	17	17	17			✓		260
5135	Sales workers	20	20	20	20	20	S				240

especially in Canada and the US, meant the direct involvement of sales representatives. Another factor was the impact of a number of mergers. Between now and 1992, employment among sales supervisors should remain at its 1981 level, with any extra hiring in this area probably benefiting the sales and advertising management occupations group.

Employment among COMMERCIAL TRAVELLERS (5133), which showed little variation between 1971 and 1981, should remain at its 1981 level throughout the projection period. The number of jobs among SALES WORKERS (5135) will increase somewhat - to 240 by 1992, up 20% over 1981 - in order to provide distributors and merchants with effective sales support for the wider range of furniture products that will be offered by manufacturers.

4) PRODUCTION: MACHINING AND RELATED OCCUPATIONS

a) Metal Machining Occupations

Metal machining occupations account for only a small percentage of the production workers in the Quebec furniture industry. In 1981 there were 170 people employed in MACHINIST AND MACHINE-TOOL SETTING-UP OCCUPATIONS (8313) and 200 employed in WELDING AND FLAME CUTTING OCCUPATIONS (8335). Employment in these two occupational groups remained stable between 1971 and 1981, and they were less severely affected than other groups by the 1982 recession because their skills are essential for production and their numbers were already quite limited. During the second half of the 1980s hiring in the two groups should increase slightly. Employment growth in the machinist and machine-tool setting-up occupations will mainly be due to growth in furniture shipments, though this factor will be offset somewhat by the increased productivity resulting from greater use of NCMTs. A larger volume of shipments and a broader range of products should both contribute to a small rise in the number of jobs in the welding and flame cutting occupations. By 1992, employment in the two groups should reach 200 and 220 jobs respectively.

b) Wood Machining Occupations

Representing four times as many jobs as the metal machining occupations, the wood machining occupations saw moderate growth in their numbers between 1971 and 1981. Over the projection period this growth will continue but at a much slower pace. By 1992 the Quebec furniture industry should provide jobs for 280 workers in WOOD SAWING OCCUPATIONS (8353), 750 workers in PLANING, TURNING AND SHAPING OCCUPATIONS (8355) and 530 workers in WOOD SANDING OCCUPATIONS (8357). Several factors will have an influence on the relatively slow growth - slower than that of the industry in any case - in employment in these occupational groups between now and 1992. These are the 1982 recession; the introduction of new materials, thus reducing the steps involved in wood processing; greater automation of production equipment, resulting in fewer errors and increased productivity; and more extensive subcontracting to reduce the cost of machining certain parts or certain types of materials.

People employed in FILING, GRINDING, BUFFING, CLEANING AND POLISHING OCCUPATIONS (8393) work chiefly in wood furniture machining. The employment trend in this group differs, however, from that of the three occupational groups discussed above. Moreover, the group's employment level appears to have been underestimated in the 1971 census, according to the respondents to our industry questionnaire. Between 1981 and 1992 the number of jobs in this group should rise by 20%, mainly because of the increased use of synthetic products in the manufacture of modern - and contemporary - style furniture. These new materials require a great deal of lacquer, thus entailing more extensive finishing work.

c) Product Fabricating and Assembling Occupations

CABINET AND WOOD FURNITURE MAKERS (8541) form the single most important occupational group in the furniture industry. In 1981, there were over 5,000 jobs in this group, ie twice as many as in 1971. The responses to our industry questionnaire attribute this growth to the strong demand for furniture between 1971 and 1975, the broader range of products offered, and the fact that this

TABLE 20
RECENT AND PROJECTED EMPLOYMENT
PRODUCTION: MACHINING AND RELATED OCCUPATIONS
QUEBEC FURNITURE AND FIXTURE INDUSTRY

OCCUPATIONAL GROUP		EMPLOYMENT 1971 TO 1981					MECHANICAL PROJECTION * for 1992 (fixed coefficient)	REVISED PROJECTION for 1992 (after industry consultation)	
		NUMBER		Var. 81/71 (%)	STRUCTURE				
CCDO	OCCUPATION	1971	1981		1971	1981		NUMBER	STRUCTURE
8313	Machinist and machine-tool setting-up	165	170	3.0	1.07	0.74	200	200	0.77
8335	Welding and flame cutting	200	200	-	1.32	0.88	240	220	0.85
8353	Wood sawing	160	250	56.3	1.04	1.09	295	280	1.08
8355	Planing, turning and shaping	525	695	32.4	3.40	3.02	815	750	2.88
8357	Wood sanding	445	500	12.4	2.88	2.18	590	530	2.04
8393	Filing, grinding, buffing, cleaning and polishing	45	330	633.3	0.31	1.44	390	400	1.54
8529	Fabricating & assembling: metal products	65	290	346.2	0.43	1.25	340	370	1.42
8540	Foremen/women: wood products	385	1 005	161.0	2.48	4.36	1,175	1,100	4.23
8541	Cabinet and wood furniture makers	2,350	5,145	118.9	15.23	22.38	6,045	5,800	22.31
8548 8549	Labouring and other elemental work: wood products	460	2,270	393.5	2.97	9.88	2,670	2,700	10.38
8781	Carpenters	460	290	-37.0	2.97	1.25	340	250	0.96
	SUBTOTAL	5 260	11145	111.9	34.10	48.47	13,100	12,600	48.46

* Reflects the 1981 occupational structure and is based on our overall employment projections using Labour Force Survey data; the LFS overall employment level for 1981 is close to that reported in the Census.

SOURCES: Statistics Canada, Census of Canada, 1971 and 1981, and Labour Force Survey, Cat No 71-001; CEIC, Economic Services Branch, Quebec Region.

FACTORS THAT MAY AFFECT EMPLOYMENT IN THE PRODUCTION (MACHINING AND RELATED) OCCUPATIONS TO 1992
QUEBEC FURNITURE AND FIXTURE INDUSTRY
PERCENTAGE BREAKDOWN OF RESPONSES TO INDUSTRY QUESTIONNAIRE

TABLE 21

INDUSTRY AS A WHOLE	A	VOLUME OF SHIPMENTS	EXPECTED INCREASE			
			None	Slight	Moderate	Large
		• Canada	8	30	54	8
		• Foreign markets	19	19	37	25
	B	RANGE OF PRODUCTS	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		• Broader		50	20	30
		• Styles changed more frequently		15	23	62
		• Other (specify)				
OCCUPATIONAL GROUP IN QUESTION	C	AUTOMATION	EXPECTED USE			
			None	Slight	Moderate	Large
		• Conveyors	12	38	25	25
		• Manual adjustment	29	42	29	
		• Numerical control		12	38	50
		• Robots	60	11	18	11
		• Other (specify)				
	D	WORK	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		• Organization		29	29	42
		• Tasks		38	50	12
		• Increased productivity			14	86
		• Subcontracting		30	40	30
		• Other (specify)				
	E	OTHER (SPECIFY)	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		•				
		•				
		•				

TABLE 22

OCCUPATIONAL GROUP		IDENTIFICATION OF FACTORS %					ANTICIPATED IMPACT ON PERSONNEL				
							Increase (S:Slight M:Moderate L:Large)	Decrease	None	Retrain	ESTIMATED JOBS IN 1992 (after consultation)
CCDO	OCCUPATION	A	B	C	D	E					
8313	Machinists and machine-tool setting up	33	17	42	8		S			✓	200
8335	Welding and flame cutting	40	40		20		S				220
8353	Wood sawing	50	25		25		S			✓	280
8355	Planing, turning and shaping	50	32		18		S			✓	750
8357	Wood sanding	50	32	18			S			✓	530
8393	Filing, grinding, buffing, cleaning & polishing	43	29	14	14		M			✓	400
8529	Fabricating & assembling metal products	25	25		50		M			✓	370
8540	Foremen/women: wood products	38	12	25	25		S			✓	1100
8541	Cabinet and wood furniture makers	42	17	24	17		S				5800
8548 8549	Labouring and other elemental work: wood products	67	33				S				2700
8781	Carpenters	40			60			S			250

work remains essentially manual, so that it is difficult to take advantage of economies of scale through modernization. While the industry has only recently regained the sales volume it lost during the 1982 recession, employment prospects for cabinet and wood furniture makers look promising for the period from 1981 to 1992, with forecast job growth of 13%, which corresponds to the overall rate for production employees working in machining and related occupations.

Employment in the FOREMEN/WOMEN: WOOD PRODUCTS GROUP (8540) suffered the effects of company rationalization measures during the 1982 recession. To head their production teams, furniture manufacturers now want foremen and forewomen who not only have a good knowledge of furniture making but are also able to operate automated machine tools. Foremen and forewomen having proven skills in these two areas will be favoured in hiring. The number of employees in this occupational group should rise to 1,100 by 1992, up only marginally over 1981.

The OTHER FABRICATING AND ASSEMBLING OCCUPATIONS: METAL PRODUCTS GROUP (8529) enjoyed strong growth during the 1970s, but there were still only 290 such workers in the industry in 1981. The vitality of the office furniture subsector should boost demand for this occupational group, which should see its job total rise to 370 by 1992, an increase of 28% over 1981.

The LABOURING AND OTHER ELEMENTAL WORK: WOOD PRODUCTS GROUPS (8548 and 8549) should experience strong growth of about 19%, bringing their numbers to 2,700 by 1992, chiefly as a result of the anticipated increase in industry shipments during the latter half of the 1980s.

CARPENTERS (8781) are gradually disappearing from the furniture industry as a separate occupational group because their tasks are very similar to those of cabinet and furniture makers. The number of carpenters will thus decline by 14% between 1981 and 1992.

5) PRODUCTION: UPHOLSTERING, FINISHING, MAINTENANCE AND SHIPPING OCCUPATIONS

a) Upholstering

Employment statistics from the 1971 and 1981 censuses in the areas of cutting and sewing appear to be inconsistent: whereas SEWING MACHINE OPERATORS (8563) saw their numbers double over the period, TAILORS AND DRESSMAKERS (8553) suffered a noticeable drop. The 1981 figure for tailors and dressmakers must be wrong since textile and leather cutting are essential operations in the production of upholstered furniture. During our projection period, cutting tasks are expected to become more automated; thus, the employment level in this occupational group should remain about the same, with the increase in shipments being met by greater productivity. However, the popularity of leather furniture should mean slightly higher demand for workers specialized in cutting leather. Mistakes in this area are obviously more costly than mistakes made in cutting textiles. By 1992 the industry should employ about a hundred tailors and dressmakers. Employment among sewing machine operators will grow by 20% between 1981 and 1992 to meet increased demand, even though electronic sewing machines will be used more and more.

Although UPHOLSTERERS (8562) still form the second largest single occupational group after cabinet and wood furniture makers, they saw only slow growth during the intercensal period and their share of total employment in the industry even declined. According to the responses to our industry questionnaire, some upholstered furniture manufacturers have moved to Ontario; in addition, greater use of foam is cutting down the amount of upholstering work. Over the medium term most upholsterers will continue to do their job by hand. By 1992, there should be a total of 2,300 jobs in this occupational group, up 17% over the 1981 figure.

TABLE 23
RECENT AND PROJECTED EMPLOYMENT
PRODUCTION: UPHOLSTERING, FINISHING,
MAINTENANCE AND SHIPPING OCCUPATIONS
QUEBEC FURNITURE AND FIXTURE INDUSTRY

OCCUPATIONAL GROUP		EMPLOYMENT 1971 TO 1981					MECHANICAL PROJECTION * for 1992 (fixed coefficient)	REVISED PROJECTION for 1992 (after industry consultation)	
		NUMBER		Var. 81/71 (%)	STRUCTURE				
CCDO	OCCUPATION	1971	1981		1971	1981		NUMBER	STRUCTURE
8553	Tailors and dressmakers	155	25	-83.7	1.04	0.10	25	100	0.38
8562	Upholsterers	1555	1965	26.4	10.08	8.54	2,305	2,300	8.85
8563	Sewing machine operators	265	585	120.8	1.72	2.55	690	700	2.69
8584	Industrial machinery mechanics	50	100	100.0	0.34	0.43	115	130	0.50
8595	Painting and decorating occupations	695	920	32.4	4.50	4.01	1,085	1,100	4.23
8785	Painters, paperhangers	170	135	-20.6	1.10	0.58	155	140	0.54
9175	Truck drivers	260	310	19.2	1.69	1.34	360	350	1.35
9317	Packaging occupations	255	380	49.0	1.65	1.65	445	450	1.73
9921	Other occupations	545	65	-88.1	3.49	0.29	80	80	0.31
	SUBTOTAL	3950	4485	13.5	25.61	19.49	5,260	5,350	20.58

* Reflects the 1981 occupational structure and is based on our overall employment projections using Labour Force Survey data; the LFS overall employment level for 1981 is close to that reported in the Census.

SOURCES: Statistics Canada, Census of Canada, 1971 and 1981, and Labour Force Survey, Cat No 71-001; CEIC, Economic Services Branch, Quebec Region.

FACTORS THAT MAY AFFECT EMPLOYMENT IN THE PRODUCTION (UPHOLSTERING, FINISHING, SHIPPING AND MAINTENANCE) OCCUPATIONS TO 1992

QUEBEC FURNITURE AND FIXTURE INDUSTRY

PERCENTAGE BREAKDOWN OF RESPONSES TO INDUSTRY QUESTIONNAIRE

TABLE 24

INDUSTRY AS A WHOLE	A	VOLUME OF SHIPMENTS	EXPECTED INCREASE			
			None	Slight	Moderate	Large
		• Canada	8	30	54	8
		• Foreign markets	19	19	37	25
	B	RANGE OF PRODUCTS	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		• Broader		50	20	30
		• Styles changed more frequently		15	23	62
		• Other (specify)				
OCCUPATIONAL GROUP IN QUESTION	C	NEW TECHNOLOGY	EXPECTED AUTOMATION			
			None	Slight	Moderate	Large
		• Cutting of material	17	33	33	17
		• Sewing	17	50	33	
		• Manufacture of springs	20	40	40	
		• Upholstering	50	25	25	
		• Painting	50	30	10	10
		• Other (specify) Packaging	60	40		
	D	WORK	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		• Organization		75		25
		• Tasks		40	40	20
		• Increased productivity		40		60
		• Subcontracting		75	25	
		• Other (specify)				
	E	OTHER (SPECIFY)	EXPECTED CHANGE			
			None	Slight	Moderate	Large
		•				
		•				

TABLE 25

OCCUPATIONAL GROUP		IDENTIFICATION OF FACTORS %					ANTICIPATED IMPACT ON PERSONNEL				
CCDO	OCCUPATION	A	B	C	D	E	Increase (S:Slight M:Moderate L:Large)	Decrease	None	Retrain	ESTIMATED JOBS IN 1992 (after consultation)
8553	Tailors & dressmakers	50	25	25					✓	✓	100
8562	Upholsterers	20	40	20	20		S				2300
8563	Sewing machine operators	30	40	30			S				700
8584	Industrial machinery mechanics		34	33	33		M			✓	130
8595	Painting and decorating occupations	25	25	25	25		S				1100
8785	Painters, paperhangers								✓		140
9175	Truck drivers						S				350
9317	Packaging occupations	25	50	25			S				450
9921	Other occupations	50	50				S				80

b) Finishing

The number of people employed in the PAINTING AND DECORATING OCCUPATIONS (8595) rose only slightly between 1971 and 1981, while the number of workers in the PAINTERS, PAPERHANGERS AND RELATED OCCUPATIONS GROUP (8785) decreased. Employment in the two groups should rise over the projection period as consumers demand better quality finish in their furniture and as more extensive use is made of lacquers requiring several coats. Recently, new finishing processes have been introduced which provide the same quality finish with fewer coats, but costs are high. There will be very little automation of painting operations during our projection period. Automated painting methods are complex, and their best application is for ready-to-assemble furniture. Given the above factors, the employment level in occupational group 8595 should rise to 1,100, while that in group 8785 should remain fairly stable.

c) Maintenace

Between 1971 and 1981 the number of INDUSTRIAL MACHINERY MECHANICS (8584) in the Quebec furniture industry increased twofold. Around the mid 1970s furniture manufacturers began to make considerable capital investments in manually regulated machine tools, thus creating new jobs for equipment maintenance and repair workers. However, not all firms have their own mechanics. Some companies contract the work out to specialized firms, while others make do with the mechanical expertise of their foremen/women or more knowledgeable machinists. This diversity of machinery maintenance services should continue during the projection period. As a result of the move toward greater mechanization that began in the early 1980s and will accelerate to 1992, demand for machinery mechanics will rise. Skills required will henceforth include a basic knowledge of electronics, and workers now employed will have to be retrained in the new technology. By 1992 there should be approximately 130 industrial machinery mechanics in the industry, an increase of 30% over 1981.

d) Shipping

Over the medium term the packaging operations that have traditionally been done by hand will gradually become automated in the larger manufacturing firms. For instance, office furniture will increasingly be prewrapped with plastic and straps on the assembly line while accessories will be packaged separately in order to meet a broad range of consumer preferences. Good packaging is essential if furniture products are to arrive at their destination in good condition. The increase in furniture shipments over our projection period should mean a 1992 employment level of 450 jobs in the PACKAGING OCCUPATIONS GROUP (9317).

Between 1981 and 1992, employment among TRUCK DRIVERS (9175) should follow the same trend as in the 1970s. A large amount of trucking will still be contracted out, particularly out-of-province haulage. A slight increase in the number of truck drivers in the industry is expected in order to meet growth in local demand.

A P P E N D I X

APPENDIX A

LIST OF CANADA EMPLOYMENT CENTRES BY DISTRICT
CANADA EMPLOYMENT AND IMMIGRATION COMMISSION
QUEBEC REGION

DISTRICT	CEC
SOUTH AND CENTRAL QUEBEC	TROIS RIVIERES REGION
	Bécancour, Cap de la Madeleine, Drummondville, Grand Mere, La Tuque, Louiseville, Plessisville, Shawinigan, Trois Rivieres (sub), Trois Rivieres (main), Victoriaville (sub), Victoriaville (main)
	EASTERN TOWNSHIPS REGION
	Asbestos, Coaticook, East Angus, Lac Megantic, Magog, Richmond, Sherbrooke-Olivier (sub), Sherbrooke-Olivier (main), Sherbrooke-Place Jacques Cartier (sub), Sherbrooke-Place Jacques Cartier (main)
	SOUTH OF MONTREAL REGION
	Acton Vale, Beauharnois, Beloeil, Chambly, Chateauguay (sub), Chateauguay (main), Contrecoeur, Cowansville (sub), Cowansville (main), Dorion, Farnham, Granby (sub), Granby (main), Huntingdon, Pierreville, St Hyacinthe (sub), St Hyacinthe (main), St Jean (sub), St Jean (main), Sorel (sub), Sorel (main), Valleyfield (sub), Valleyfield (main), Waterloo
QUEBEC CITY/SAGUENAY/ LAC ST JEAN	QUEBEC CITY REGION
	Beauport (sub), Beauport (main), Charlesbourg, Donnacona, Duberger (sub), Duberger (main), La Malbaie, Lévis, Montmagny, Montmorency, Ste Foy, St Georges (sub), St Georges (main), Ste Marie, Thetford Mines
	SAGUENAY/LAC ST JEAN REGION
	Alma, Chibougamau, Chicoutimi, Dolbeau, Jonquiere, La Baie, Roberval (sub), Roberval (main)

APPENDIX A (suite)

LIST OF CANADA EMPLOYMENT CENTRES BY DISTRICT
CANADA EMPLOYMENT AND IMMIGRATION COMMISSION
QUEBEC REGION

DISTRICT	CEC
NORTH/WEST	NORTH WEST REGION Amos, La Sarre, Rouyn (sub), Rouyn (main), Senneterre, Val d'Or (sub), Val d'Or (main), Ville Marie OUTAOUAIS REGION Buckingham, Campbell's Bay, Gatineau, Hull (sub), Hull (main), Maniwaki, Mont Laurier NORTH OF MONTREAL REGION Berthierville, Joliette, Lachute, Repentigny, St Agathe, St Eustache, St Jerome, St Therese, Terrebonne
LOWER ST LAWRENCE/GASPE/ NORTH SHORE	LOWER ST LAWRENCE/GASPE REGION Cap aux Meules, Causapscal, Chandler, Gaspé (sub), Gaspé (main), La Pocatiere, Matane, Mont Joli, Murdochville, New Richmond, Rimouski (sub), Rimouski (main), Riviere du Loup, St Anne des Monts NORTH SHORE REGION Baie Comeau (sub), Baie Comeau (main), Forestville (sub), Forestville (main), Port Cartier, Sacré Coeur, Sept Iles (sub), Sept Iles (main)
METROPOLITAN MONTREAL	MONTREAL/EAST ADMINISTRATIVE CENTRE Anjou, Broadway, Langelier, Ontario MONTREAL/NORTH-WEST ADMINISTRATIVE CENTRE Atwater, Ferrier, St Laurent

APPENDIX A (suite)

LIST OF CANADA EMPLOYMENT CENTRES BY DISTRICT
CANADA EMPLOYMENT AND IMMIGRATION COMMISSION
QUEBEC REGION

DISTRICT	CEC
	SOUTH SHORE ADMINISTRATIVE CENTRE Brossard, Longueuil North, Longueuil South, St Hubert MONTREAL/CENTRE-SOUTH ADMINISTRATIVE CENTRE Downtown, Frontenac, Verdun MONTREAL/CENTRE-NORTH ADMINISTRATIVE CENTRE Clark, Cremazie, Henri Bourassa, Viau MONTREAL/CENTRE ADMINISTRATIVE CENTRE Jarry, Outremont, St Denis/Rachel, St Denis/Rosemont MONTREAL/WEST ADMINISTRATIVE CENTRE Lachine, LaSalle, Pointe Claire LAVAL ADMINISTRATIVE CENTRE Laval Centre, Laval East, Laval West